



User Guide

TWS Rules V2.1

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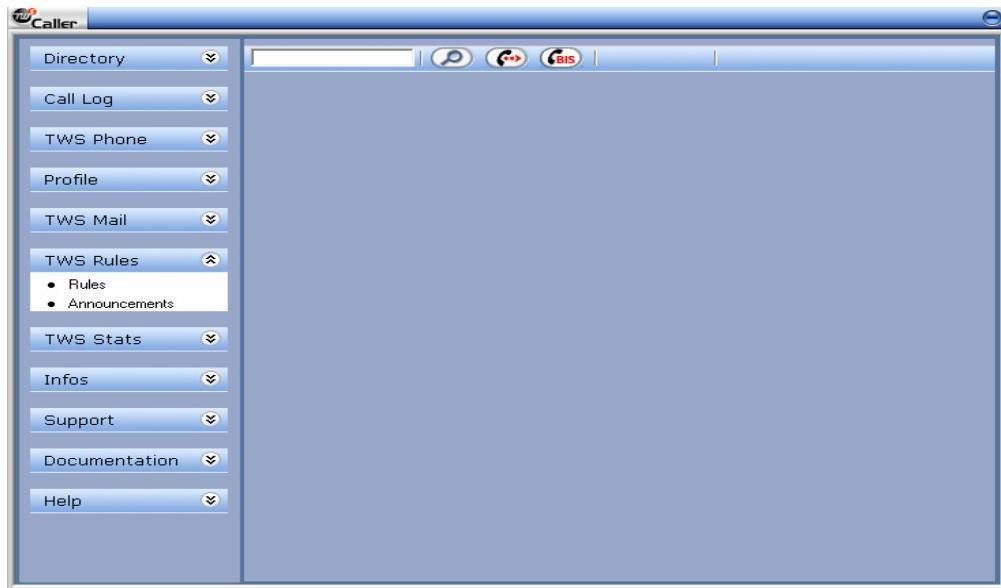
User Guide

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1. Overview

Like all TWS applications, TWS Rules is a thin-client solution that does not need to be installed on your PC. Its user interface is based on HTML pages integrated into TWS Caller menus.



TWS Rules is an integrated application in the TWS Caller window which allows incoming calls to be managed intelligently using forwarding and filtering rules.

These rules are very easy to create; a wizard guides the user through the different rules-creation steps.

The user himself or herself defines the criteria for routing and filtering incoming calls by fixing the following parameters:

- Forward destination
- Activation period
- The numbers to exclude or include
- The voice announcement to play back before forwarding or transferring the incoming call

TWS Rules is, therefore, an-easy-to-use and efficient application which enables you to effectively manage your incoming calls.

This document presents *TWS Rules* and describes in detail how to make the most of it.

NOTE : do not use the PBX and TWS phone forwarding functions to avoid a conflict of rules between the PBX, TWS Phone and/or TWS Rules. Any reciprocal rule detected will not be executed. For example, one of your rules provides for forwarding to a correspondent who equally has a rule for forwarding to you.

2. Using TWS Rules

By default, the *TWS Rules* window is located in the *TWS Caller* menu; to access it:

Click  (on the *TWS Caller* bar) then on:



You then have access to the *TWS Rules* menu comprising *Rules* and *Announcements*.

2.1. Creating a call-forwarding rule (4 step)

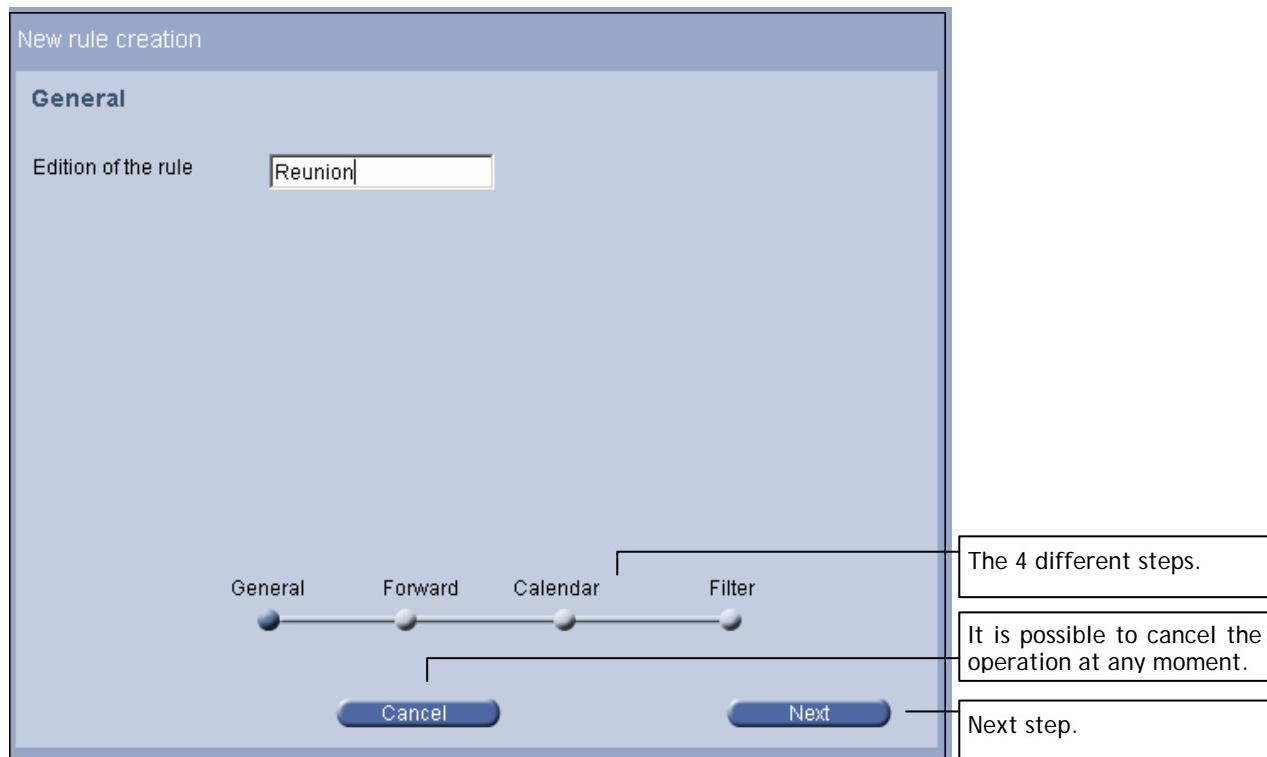
To create a call-forwarding rule, click *Rules* in the *TWS Rules* menu: the main management page of your intelligent forwarding rules opens.

On your forwarding-rule management page, click *Create* to start the rules creation wizard.

EXAMPLE: the images displayed give a good example of a call-forwarding rule for an employee who attends a meeting on Mondays and Fridays and who wishes to be disturbed only by members of the management. In the example, this employee will be called Mr Hector.

Step one: General

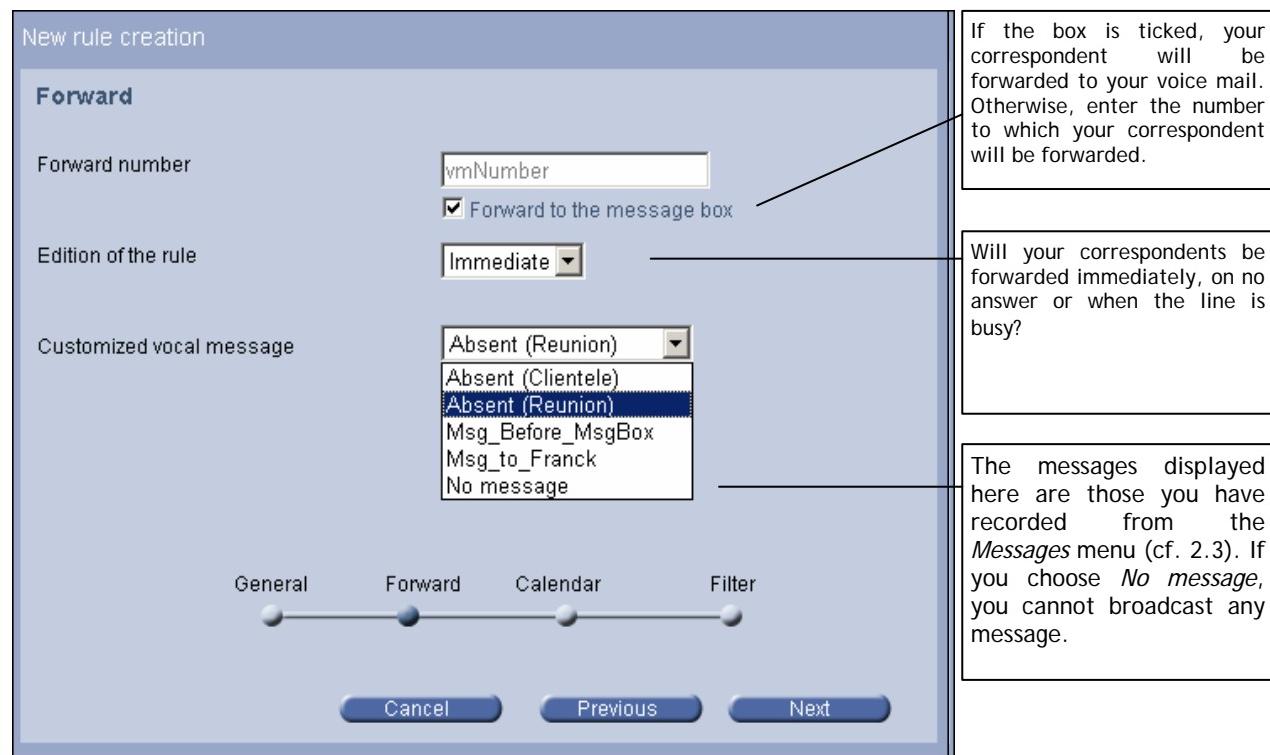
This page lets you give a title to your rule.



If forwarding rules have already been defined, this page contains an additional field, which enables you to define a priority level for your new rule, compared to the already existing rules (see image below).

Step two: Forward

The second page allows you to define the inbound call forwarding parameters: to which number will the calls be forwarded? With what type of forwarding (immediate, on no answer, on busy)? Will an announcement message be broadcast to your correspondent before calls are forwarded?



INFORMATION: if for a rule the *Delay before forwarding* is *Immediate*, it is normal for you to hear a first ring tone on your telephone set before your correspondent is forwarded to the number you have indicated.

INFORMATION: if thanks to *TWS Rules* you forward your incoming calls to your voice mail - *TWS Mail* or any other voice mail system - and you choose to broadcast a message before forwarding is executed, your correspondent will hear two messages successively: one from *TWS Rules* and the other from your voice mail system.

Step three: Calendar

It is possible in this third step to specify the period during which the rule you define will be applied.

New rule creation

Calendar

Start Date	End date
1/2/2006	1/16/2006
<input checked="" type="checkbox"/> No date limit	
Start hour	End hour
08 h00	13 h00
Valid days	
<input checked="" type="checkbox"/> mon <input type="checkbox"/> tue <input type="checkbox"/> wed <input type="checkbox"/> thu <input checked="" type="checkbox"/> fri <input type="checkbox"/> sat <input type="checkbox"/> sun	

If you tick *No date limit*, the rule will be applied indefinitely as from the start date. Otherwise, choose an end date.

Choose the time during which the rule will be applied.

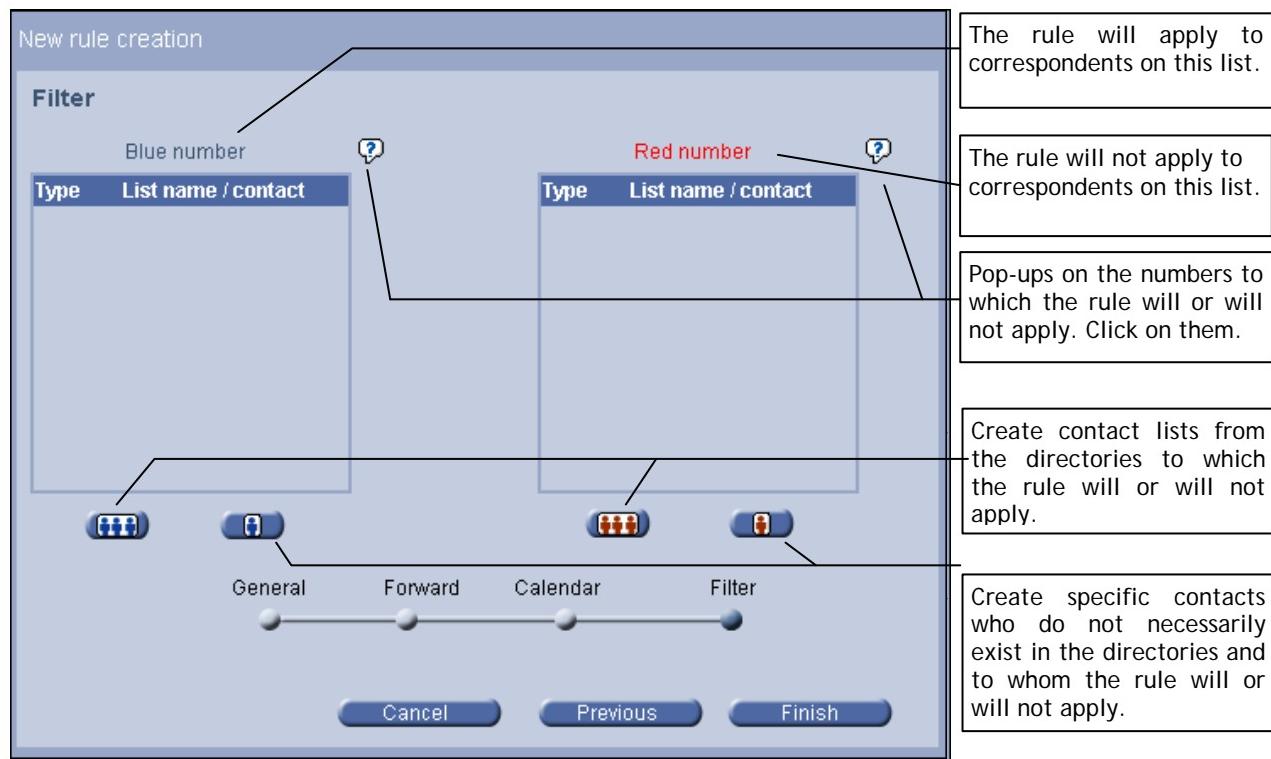
Choose the days of the week on which the rule will be applied.

General Forward **Calendar** Filter

Cancel Previous Next

Step four: Filtering - Managing lists

This last step enables you to choose the numbers to be filtered and to which the rule may or may not be applied.



INFORMATION: when the number of one of your correspondents is both in *Blue numbers* and *Red numbers* (available on a list or as a specific contact) the rule will not apply to this number, and this correspondent will not be forwarded because *Red numbers* are first considered before *Blue numbers*.

To create a list from the contacts listed in your directories (this list will be used by the rule in *Red numbers* or *Blue numbers*, click or ; the next page will open.

The **Blue numbers** represent the list of contacts to which the rule applies:

These contacts will be systematically subjected to the existing rule. It is possible to use contact lists from directories, or to create specific contacts for the rule. The lists can be reused in all the rules.

On the other hand, creating a specific contact manually enables you to create a contact that is visible only in the existing rule. It also allows the use of patterns such as 06* (to include all French mobile phone numbers).

If no contact has been defined in *Blue numbers*, the rule applies to everyone, except those in *Red numbers*. If at least one contact is present, all the other numbers are excluded. In this case, there is no point in using filtering by *Red numbers*.

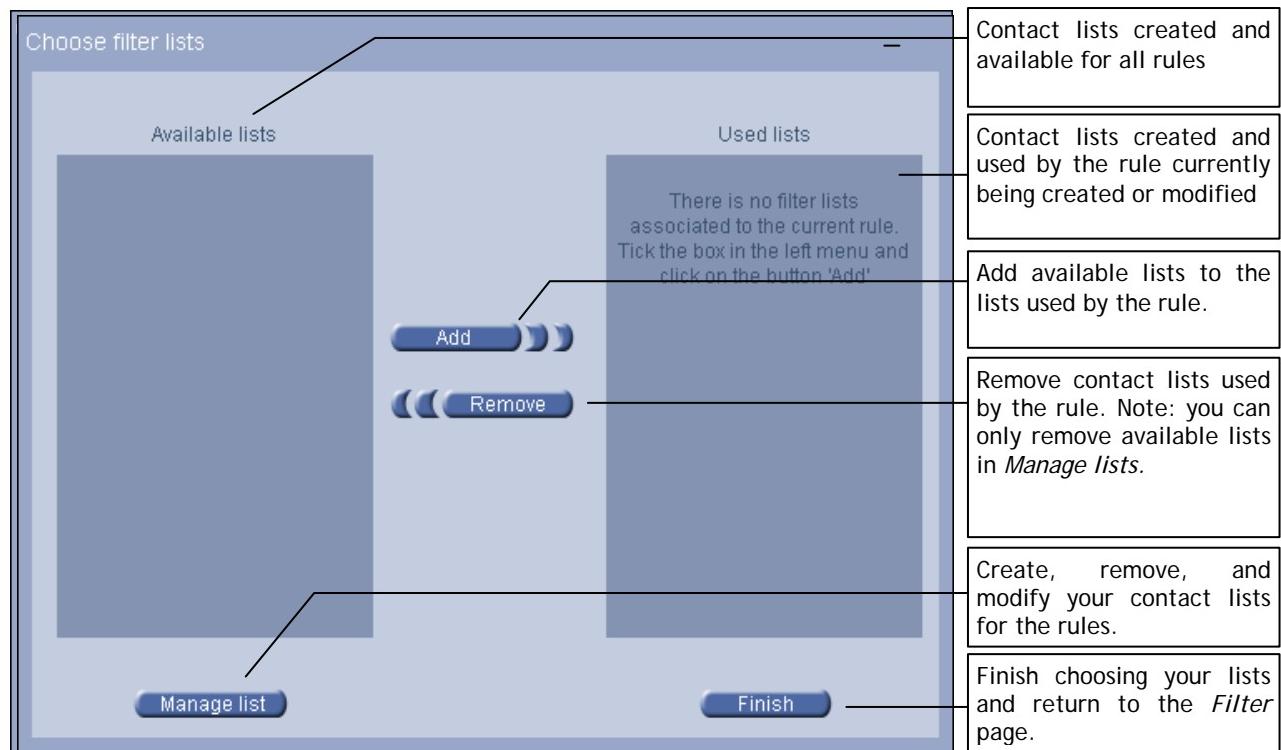
Red numbers represent the list of contacts to whom the rule does not apply:

These contacts will be systematically ignored by the existing rule. It is possible to use existing  lists, or to create specific contacts for the  rule.

If no contact has been defined in *Red numbers*, the rule applies to everyone, except those in *Blue numbers*.

Different cases of rules:

- A rule that does not contain any *Blue number* or *Red number* applies to all calls.
- A rule containing only *Blue numbers* but no *Red numbers* applies only to calls whose number is in the list of *Blue numbers*.
- A rule containing *Blue numbers* and *Red numbers* applies only to calls from *Blue numbers* and not *Red numbers*.
- A rule containing no *Blue number* but *Red numbers* applies to all calls except calls that are part of the list of *Red numbers*.



Then click  to go to the list manager.

2.1.1.1. Shared contact list manager

Manage list

List edition/List creation

Create a new list List name List 1

Add a contact

Choose a directory Type the name Search

First name	Name	Company	Devices

Contacts in the list :

Del.	First name	Name	Device

Delete this list Save changes Back to the rule

Editing/creating lists. To create a list, choose *Create a new list*.

Enter the name of your list.

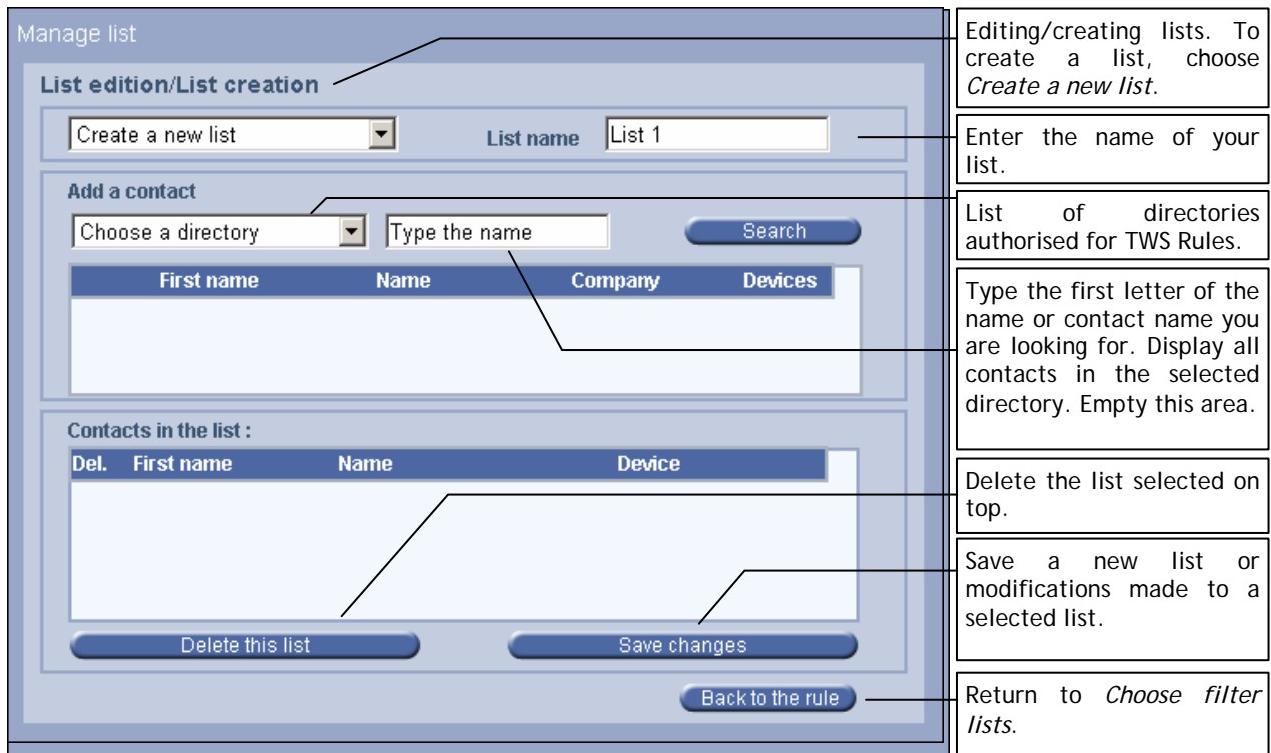
List of directories authorised for TWS Rules.

Type the first letter of the name or contact name you are looking for. Display all contacts in the selected directory. Empty this area.

Delete the list selected on top.

Save a new list or modifications made to a selected list.

Return to *Choose filter lists*.



The above screenshot shows how to *Create a new list*.

The screenshot displays the 'Manage list' interface with the following components and annotations:

- Selected directory:** ALGORIA
- Create a new list:** dropdown menu
- List name:** input field
- Direction:** input field
- Add a contact:** search bar with dropdown set to 'Algoria' and a 'Search' button.
- Contact list:** grid showing contacts with columns: First name, Name, Company, Devices. Contacts listed are Jocelyn AZIERE ALGORIA, Marc CHARTIER ALGORIA, and Poste Joss.
- Actions:** various icons for adding, deleting, and filtering contacts.
- Filtering:** a tooltip '4032 – Click here to filter this number' points to a filter icon in the contact grid.
- Contacts in the list:** list of selected contacts with columns: Del., First name, Name, Device. The contacts listed are Jocelyn AZIERE (Device 4031), Jocelyn AZIERE (Device 06 4032), Jocelyn AZIERE (Device 01), and Marc CHARTIER (Device 4032).
- Actions:** checkboxes for removing contacts from the list and a 'Delete this list' button.
- Buttons:** 'Save changes' and 'Back to the rule'.
- Annotations:**
 - Empty search field for all ALGORIA contacts.
 - Add all numbers of this contact.
 - Add all numbers of all contacts.
 - Remove this contact's number from the list.
 - Remove all numbers from the list.
 - Click *Save changes* after choosing the numbers, to back up your list.

After creating the lists and returning to rule, the following window opens, for instance:

The screenshot shows the 'Available lists' and 'Used lists' interface:

- Available lists:** list containing 'Algoria' and 'Direction'. An 'Add' button is located below the list.
- Used lists:** message stating 'There is no filter lists associated to the current rule. Tick the box in the left menu and click on the button 'Add'.'

You can then add these lists for the rule you are creating or modifying, or for any other rule you have created, then return to the *Filter* page.

2.1.1.2. Specific contact list manager

To create specific contacts for a rule and which will be used by the rule as *Blue numbers* or *Red numbers*, click respectively on or : the following page opens.

The screenshot shows the 'List administration' interface for 'Edition of a specific contact list of the current rule'. On the left, there's a form for 'Add a contact' with fields for Office number, Home number, and Mobile phone number. Below it is a table titled 'Created contacts:' showing four entries: Franck, Franck, Franck, and Stephanie, each with a delete icon (X). On the right, there are several callout boxes with labels:

- Surname, First name, Company
- Office number, Home number, Mobile phone number
- Help and information balloon
- Create contact to add it to the contacts used by the rule.
- Delete all the contacts created.
- Delete contact.
- Return to Choose filter lists.

Add a contact

Office number	Home number	Mobile phone number
Stephanie	0698 23	

Created contacts :

First name	Last name	Device
Franck		0149 19
Franck		0623 07
Franck		0145 25
Stephanie		0698 23

[Back to the rule](#)

Contacts created here are immediately added to the contact lists used by the rule.

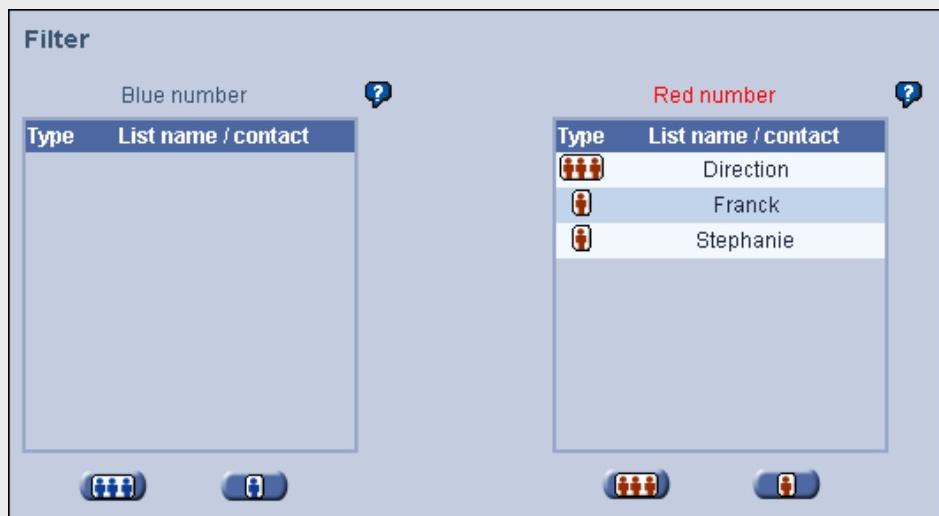
You must not fill in all the number fields; at least one is enough.

Only the surname and first name of a contact are displayed.

You can use an asterisk (*) to indicate a number prefix (06* for mobile phones, for example).

2.1.1.3. Example of how lists are used

EXAMPLE: Mr Hector is creating a rule that will allow only certain members of the management team to disturb him during his meeting hours. So he is creating a list of management team members (cf. 2.2.4.1) and adding specific contacts who will be allowed to reach him (cf. 2.2.4.2). He is applying the following filter:



The *Red numbers* are not subject to the forwarding rule. Mr Hector has chosen forwarding to voice mail. Therefore, the management, Franck and Stephanie will not be forwarded to his voice mail.

The *Blue numbers* are subject to the rule. Mr Hector has not added any contact there; this means that any contact not included in the list of *Red numbers* will be subject to the forwarding rule.

Mr Hector's filter is correctly applied. He will only be disturbed by those persons he has chosen.

INFORMATION:

When the *Inclusive filter (blue number)* list is empty, this means that all numbers are subject to the rule.

When the *Exclusive filter (red numbers)* list is empty, this means that no number will be exempted from the rule.

2.2. Displaying and managing rules

This is how your rules will be displayed in the menu *TWS Rules* then *Rules*.

In this *TWS Rules* main page, you will see in detail all the rules you have created. You have the possibility to delete them or to use the wizard to modify them or create new ones.

Acti.	Title	Forward to	Pty
	Absent (Clientele)	Vocal message box	
▶	Reunion	Vocal message box	
	News for Franck	4036	

Rule Details

Title	Reunion
Period	From 02/01/2006
Week Days	Monday Friday
Time Slot	08:00 to 13:00
Vocal customized Msg	Absent (Reunion).wav
Forwarded destination	Vocal message box
Forward delay	Immediate
Filter	
Inclusive filter	Direction - Franck - Stephanie
Exclusive filter	

Buttons: Modify, Remove, **Test rules**, Create

Callout 1 (Priority): Rule priority. When a number is subject to several rules, priority determines the one to be applied.

Callout 2 (Test rules): Test your rules. Simulate calls from your contacts to see the result of rule application.

It is interesting at this level to be able to test your rules. Simulate calls from your contacts to know how forwarding will take place, which rule will be applied, and which message will be broadcast. These are the operations inherent in this feature and which will be very useful while creating and using your rules.

Rule priority: example of use

EXAMPLE: Mr Hector will be away for ten days. He creates the rule *Absent (clientele)*:

Rule Details	
Title	Absent (Clientele)
Period	1/11/2006 to 1/20/2006
Week Days	All days
Time Slot	All the day
Vocal customized Msg	Absent (Clientele).wav
Forwarded destination	Vocal message box
Forward delay	Immediate
Filter	
Inclusive filter	
Exclusive filter	

Moreover, he would like:

- his colleague *Franck* to take his call when he calls (*Msg_to_Franck.wav*)
- to be transferred on no answer to his assistant (4036) if she is present.

Rule Details	
Title	News for Franck
Period	1/2/2006 to 1/9/2006
Week Days	Monday Tuesday Thursday Friday
Time Slot	09:00 to 20:00
Vocal customized Msg	Msg_to_Franck.wav
Forwarded destination	4036
Forward delay	No reply
Filter	
Inclusive filter	Franck
Exclusive filter	

Now, Mr Hector wishes to classify his rules according to the order of priority. He places the rule *Absent (clientele)* on top of the list. So anybody calling during the specified period (from 11/01/2006 to 20/01/2006) will be transferred to voice mail with the message *Absent_Clientele.wav*.

Mr Hector would not like anybody to disturb him during his meeting hours. Therefore, *Meeting* is placed in the second position to filter those who may reach him. For the rule *News for Franck* to work, Mr Hector places it in the third position.

Why? The *Meeting* rule also governs *Franck*'s numbers. They are part of the *Exclusive filter* list; so if *Franck* calls on Thursday 05/01/2006, for instance, the *Meeting* rule will not transfer him to voice mail, and the rule *News for Franck* will be applied.

Testing the behaviour of your call forwarding rules

On the main page of *TWS Rules* (*TWS Caller TWS Rules* menu, then *Rules*), click *Test rules*. The following screen is displayed.

Test of the rule of Hector	Default call date. Date of call.
Calling date 01/02/2006	
Calling hour 10 H 34	Default call hour. Time of call.
Appellant <input type="text"/>	Enter your contact's number.
<input type="button" value="Test"/>	Press this button to start the test.
Test result	The test result is displayed here.
<input type="button" value="Finish"/>	Return to the TWS Rules main page.

EXAMPLE: Mr Hector would like to check that his call forwarding rules are working correctly; so he performs this test.

Test of the rule of Hector
Calling date 02/01/2006
Calling hour 16 H 58
Appellant <input type="text"/> 0623 07
<input type="button" value="Test"/>
Valid rule : 'News for Franck' - Description: 0623 07 is forwarded to 4036 with the vocal message Msg_to_Franck.wav
<input type="button" value="Finish"/>

He checks that his colleague *Franck* is forwarded to his assistant with message recorded only for him.

After you have tested the behaviour of your rules, they are ready to work properly and forward your incoming calls intelligently according to the parameters you have defined.

2.3. Recording announcements

When you click *Messages*, the following page opens so you can manage your announcements.

The screenshot shows the 'Announcement administration' interface. At the top, there's a 'Callback' button and a text input field containing '4044'. Below this, on the left, is a sidebar titled 'Existing Announcements' listing: 'Absent', 'Forward', 'Meeting', 'Message for Franck', and 'MyAnnouncement'. In the center, under 'New Announcement', are buttons for 'Start recording', 'Stop recording', and 'Listen the record'. Below these is a 'Save the announcement' button and a text input field showing 'MyAnnouncement'. At the bottom left is a 'Delete the announcement' button, and at the very bottom is a status bar with 'At rest' and 'TWS-RUL-4044'. Callout boxes provide the following explanations:

- A box points to the 'Callback' button with the text: 'Have somebody call you back from an extension. You must do this to read or record announcements.'
- A box points to the '4044' input field with the text: 'Number of the extension from which the announcement will be recorded or listened to'
- A box points to the 'MyAnnouncement' list item with the text: 'Recorded messages which can be selected in order to be listened to or deleted'
- A box points to the 'TWS-RUL-4044' status bar with the text: 'Status of announcement administration and extension number used. An announcement has just been saved here.'

How does it work? Press *Voice server call*. A set calls you. Once the call is set up, you can start recording, then stop, listen to the recorded announcement and repeat the operation if you do not like the announcement.

To save the announcement, give it a name (*Transfer_Std_Messagerie* in the above example) and click *Save the announcement*. The name of your announcement appears on the list on the left. You can listen to the announcement again any time by clicking *Hear the selected announcement*. You can even delete it and, above all, use it in *TWS Rules*.